

MBE LIAISON TRAINING

Presented by Governor's Office of Minority Affairs Staff



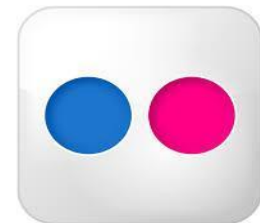
October 21, 2013



Governors Office Of Minority Affairs-GOMA



MDGOMA



Maryland GOMA

AGENDA

- Introduction of New GOMA Staff
- New Overall Goal
- Subgoals
- Veteran Owned Businesses
- GOMA – MBE Outreach
- Liquidated Damages
- SBR
 - Goal
 - Publishing of Strategic Plan Documents
 - Annual Report
- Advocacy Cases
- Annual Report Lessons Learned

GOMA STAFFING CHANGES

- **AFRA VANCE , VLT COMPLIANCE MANAGER**

NEW OVERALL MBE GOAL

- New Aspirational Goal 29%
- Does NOT apply to DBE Contracts
- Link to [Announcement](#)
- <http://goma.maryland.gov/MiscDocs/Enactment%20of%20MBE%20Goal%20Increase.pdf>

MBE PRIME REGULATION

- 50% Rule
- Work Group to be created for input into procedures
- Target is to issue regulation by year end

VETERANS PROGRAM

- By MaryJo.Childs@maryland.gov
- VOSB Advisory 2012-1:
<http://bpw.maryland.gov/Pages/adv-2012-1.aspx>
- BPW Advisory Website:
<http://www.bpw.state.md.us/Procurement/Advisories>
- U.S. Veteran Business Directory <http://www.vetbiz.gov>
- .05% goal
- Veteran Prime CAN use own workforce
- New Manager James.Pointdujour@maryland.gov
- New additions to 719 & 720 reports in process

OUTREACH OPPORTUNITIES

MBE UNIVERSITY

DECEMBER 10, 2013

REGINALD F. LEWIS MUSEUM

DOWNTOWN BALTIMORE

CONTACT APRIL.WILLIAMS@MARYLAND.GOV

See GOMA.Maryland.gov Calendar of Events

Upcoming MBE Fall Lunch & Learn Series

- **Navigating the Path to Contract Financing**
- <https://mbeufallseries.eventbrite.com/>

Interested in being an operations supplier or vendor for
the Horseshoe Casino?

Join us for an information session!

Tuesday, November 12, 2013
Hilton Baltimore, Holiday Ballroom
5-7PM

Click on the logo below to register.



[Horseshoe Casino](#)

LIQUIDATED DAMAGES

- Effective May 2013
- Next Training Dates
- Webinar Trainings for Internal and External Audience
- Watch for email regarding upcoming trainings

SUBGOALS

- Effective 2011
- Reassessment of Subgoals in late 2013/early 2014
- Send sample subgoal worksheets to COMPLIANCE.GOMA@MARYLAND.GOV
- Upcoming Workgroups

SMALL BUSINESS RESERVE

- Race Neutral Measure
- Proposed a 1% Statewide increase
- Publishing of SBR Strategic Plan forthcoming on GOMA website
- Annual Report (both to GOMA with copy to BPW james.pointdujour@maryland.gov)
- Total SBR spend = Designated SBR + Balance
- Award data should be close to MBE Award
- SBR Database in EMM– Need Login id to search SBR firms

ADVOCACY CASES

• Payment Issues

- Liaison/PO must act promptly on payment complaints
- Collect facts/documentation from all parties
- Use the available contract provisions when necessary
 - Prompt Payment Directive
<http://goma.maryland.gov/Legislation%20Docs/PromptPaymentDirectiveFINAL08-01-08.pdf>
 - Liquidated Damages

• Other issues

- Prime failure to make proper MBE notifications
- Underutilization of MBEs
- No response to information requests from agency
- Waiver determinations; AAG involvement is necessary. Copies of waiver must be sent to compliance.goma@maryland.gov.

1996-1 Attachment C

Subcontractor Project Participation Certification

*Please complete and submit one form for each MDOT certified MBE listed on Attachment A
within 10 working days of notification of apparent award*

CORRECTION TO DISCUSSION AT TRAINING

_____ (prime contractor) has entered into a contract with _____
(subcontractor) to provide services in connection with the Solicitation described below.

Prime Contractor Address and Phone	Project Description
Project Number	Total Contract Amount \$ 1,000,000.00 (Prime's total contract value)
Minority Firm Name	MBE Certification Number
Work to be Performed	
Percentage of Total Contract 5% (50,000.00 is subcontractor's value)	

ANNUAL REPORT

LESSONS LEARNED

- ADPICS VS ANSWERS
- Use Answers downloaded into excel so you can sort data a variety of ways
- Run Award reports by “Award Date”
- ANSWER e-learning Videos
<http://doit.net.md.gov/servdesk/pages/trainingvideo.aspx?video=39>

FMIS INFORMER

- DoIT Service Desk
- Service.Desk@Maryland.Gov
- [410-260-7778](tel:410-260-7778)
- [October INFORMER 2013.pdf](#)

CONTRACT AWARDS (710)

Step	Report	Source	Review Responsibility	Scope of Review
Step 1	710 is Raw Data 711 Report (Details of All Awards) SUMMARY	ANSWERS MDOT – request 711 diagnostic “Raw Data”	Procurement Sort by vendor or procurement category to review for exclusions Sort by MBE Designation (Ethnicity) to report MBE Primes	Only include reportable awards in accordance with State Policy. Exclude items such as: MOU’s, R, XMT, PPN and critically review SPs

CHANGE ORDERS (709)

Step	Report	Source	Review Responsibility	Scope of Review
Step 2	709 change order (Award)	ANSWERS	Procurement/Construction/ A&E Sort by vendor or procurement category to review for exclusions Sort by MBE Designation (Ethnicity) to report MBE Primes Sort by MBE GOAL to do the math for MBE Subcontract Awards	Only include reportable awards in accordance with State Policy. Exclude items such as: MOU's, R, XMT, PPN and critically review SPs

CORRECT MISCODINGS

- Work with Procurement/Accounting Finance to correct errors found.
- This will save time in the future so you are not “scrubbing” the SAME items each and every month.
- *BPO/PO make changes on Additional Element Screen*
- *Payments, no retro change but change behavior*

MONTHLY MBE REPORTS

- Cumulative to Date report submitted
MONTHLY
- Include Change Orders
- Include Credit Card & Direct Vouchers

MBE PRIME AWARDS

- BEWARE OF DOUBLE COUNTING AWARD TO MBE PRIME WITH MBE SUBCONTRACTOR
 - Either count 100% of MBE Prime Award or
 - Count as follows:
$$\frac{x\% \text{ MBE Prime Award} + Y\% \text{ MBE Subcontractor Award}^*}{100\%}$$

FUTURE CHANGES

DON'T PANIC



BACK OFFICE CHANGES

- AUTOMATED CONSOLIDATION OF AWARD SPREADSHEETS
- CONSOLIDATION OF FORM3 DATABASES
- REPORTS.GOMA@MARYLAND.GOV
 - Monthly MBE Reports
 - SBR Reports
- COMPLIANCE.GOMA@MARYLAND.GOV
 - Waivers
 - Recurring Contracts

FUTURE CHANGES

- Web-based data entry portal for Award and Payment Data in FY 14 – in discussion
- Web-based repository (Share Point) to replace submitting reports via e-mail – in discussion



Q & A

- ? MBE Compliance on Change Orders**
- ? Reporting MBE Prime**
- ? Reporting State Contracts**

INDUSTRY -MPPA

- mppainc.org Maryland Public Purchasing Association Regional Conference Oct. 28-30 in Ocean City, MD

INDUSTRY-ACCA

- ACCAWEB.ORG American Contract Compliance Association
- ACCA's comprehensive training program provides a unique opportunity to study among nationally recognized experts in their respective fields. The program is carefully designed to focus on the critical issues challenging our profession. ACCA has a tradition of providing 2.1 Continuing Education Units (CEUs) from Morgan State University to attendees who complete 21 hours of training.

Next Conference in San Jose, CA September 2014

NEXT MEETING

JANUARY 28, 2014

1:00 pm - 4:00pm